

Retiring the Store Flyer: Effects of Ceasing Print Store Flyers on Household Grocery Shopping Behavior

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with:

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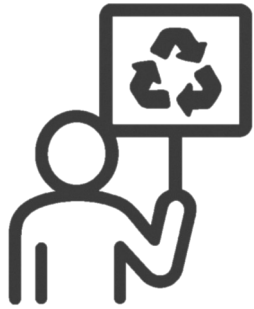
International Doordrop Media Congress
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♥ Loved by many households (and especially the Dutch)

Yet, some are reconsidering print flyers...



Pressure from
environmental
groups and
policymakers



Skyrocketing
cost of printing
and distributing
flyers

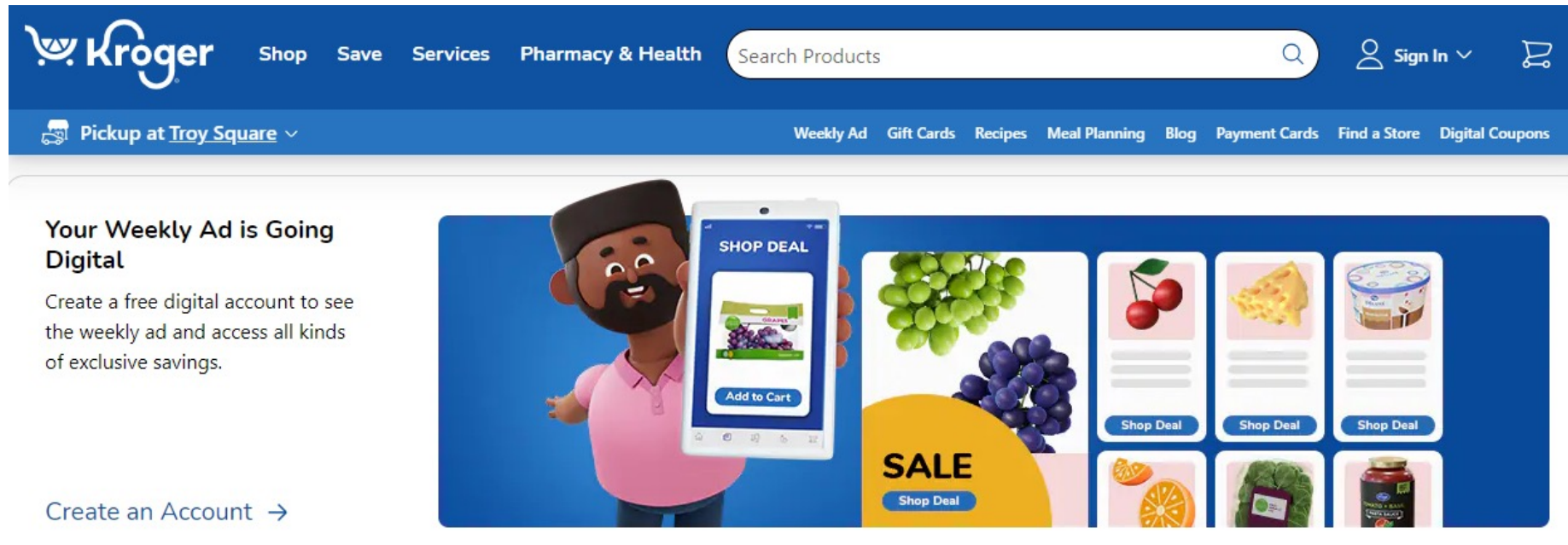


... while many say
consumers are
increasingly doing
every digital
anyhow

Several retailers already retired them



Digital flyers as the alternative



What do academics say about flyers?

- Flyers boost store traffic, especially by advertising “destination categories”

(Briesch, Dillon, and Fox 2013; Gauri, Sudhir, and Talukdar 2008; Gijsbrechts, Campo, and Goossens 2003; Guyt and Gijsbrechts 2018; Guyt and Gijsbrechts 2020; van Lin and Gijsbrechts 2016)

- Increases sales of promoted items, and non-promoted items

(Briesch, Dillon, and Fox 2013; Gauri, Sudhir, and Talukdar 2008; Gijsbrechts, Campo, and Goossens 2003; Guyt and Gijsbrechts 2020; Seiler and Yao 2017)

- Among primary and nonprimary shoppers

(Guyt and Gijsbrechts 2020)

This study

RQ1: What is the effect of a retailer retiring the store flyer on household grocery shopping behavior?

RQ2: How does the effect differ across primary vs. non-primary shoppers of the retailer?

RQ3: Can promoting digital alternatives protect retailers against possible detrimental changes in shopping behavior?

Fresh from the printer:

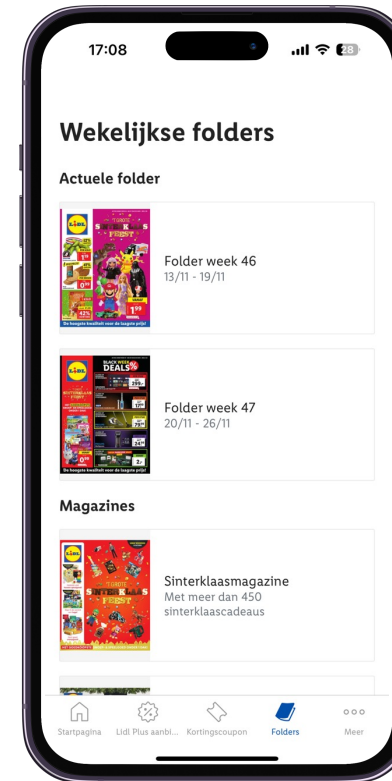
RQ4: Do households bring back their shopping when delivery gets reinstated?

Setting

Lidl: stopped distributing its store flyer in the Utrecht province in the Netherlands in January '23



Main digital alternative: Lidl Plus app



Data

- YouGov household panel data on grocery shopping behavior (via AiMark)
- 10,000 households (6-7% in Utrecht)
- Survey data on whether they receive flyers or not
- 2021-2024

Analysis

$$\text{effect} = \left(\begin{array}{c} \text{€€€€} \\ \text{shopping cart} \\ \text{after} \end{array} - \begin{array}{c} \text{€€€€} \\ \text{shopping cart} \\ \text{before} \end{array} \right)$$

But... this is too naive

*Households in Utrecht

Difference-in-Differences 🦾

$$\text{effect} = \left(\begin{array}{c} \text{€€€€} \\ \text{shopping cart} \end{array} - \begin{array}{c} \text{€€€€} \\ \text{shopping cart} \end{array} \right) - \left(\begin{array}{c} \text{€€€€} \\ \text{shopping cart} \end{array} - \begin{array}{c} \text{€€€€} \\ \text{shopping cart} \end{array} \right)$$

after before after before

*Households in Utrecht

*Households in other provinces

RQ1

Do households adjust grocery shopping behavior?

Disclaimer

- Effects are across **all** households that visited Lidl before and stopped receiving the flyer (big and small spenders)
- Should **not** be interpreted as changes for the retailer or stores as a whole

Across households that visited Lidl before and stopped receiving the flyer

- Trips
 - Total spending
 - Spending on promotion
 - Spending not on promotion
- All down

Where do they bring their
business?

Other retailers households visit alongside Lidl?
Other hard-discounter?

Other hard-discounter gains across the focal households

- Trips
 - Total spending
 - Spending on promotion
 - Spending not on promotion
- All up

What about the long run?

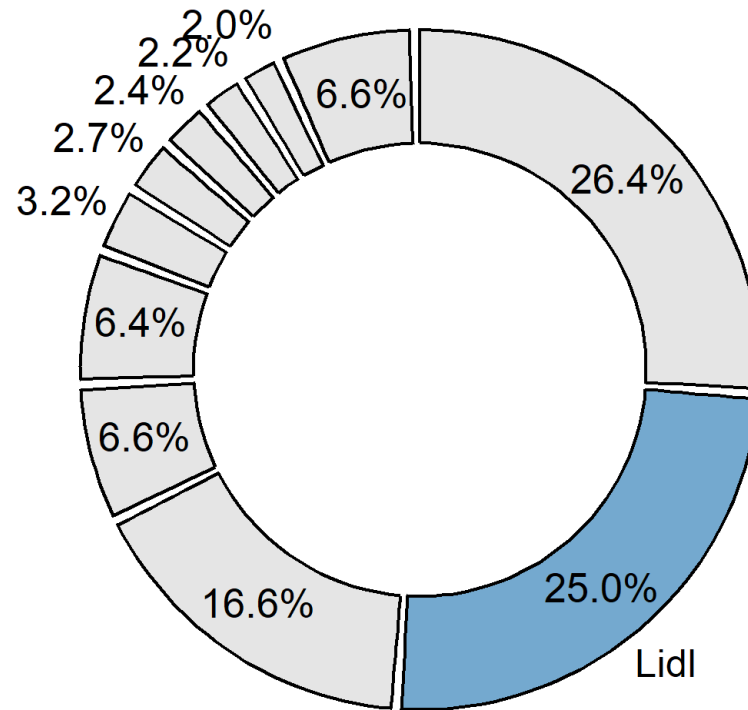
Not getting better in the long run

- Lidl: no difference between first and second 6 months
- Other hard discounter: increases get larger in second 6 months

RQ2

Do the effects differ for primary vs. non-primary shoppers?

Households' primary retailer



% of households

Effect is driven by non-primary shoppers

- Primary shoppers: no significant effects
- Non-primary shoppers: trips, spending, promotional spending, non-promotional spending all down substantially

RQ3

Can promoting digital alternatives prevent changes?

ACTIES VANAF MA 29 MEI T/M ZO 4 JUNI - 2023 / G2

LIDL

BEST GETEST
"Een lekkere stroopwafel hoeft niet duur te zijn!"
- Algemeen Dagblad

26% KORTING
Kastanje-champignons
250 GRAM
1.75
1.29

20% KORTING
Kordaat pils of radler 0.0%
6-PACK
2.49
1.99

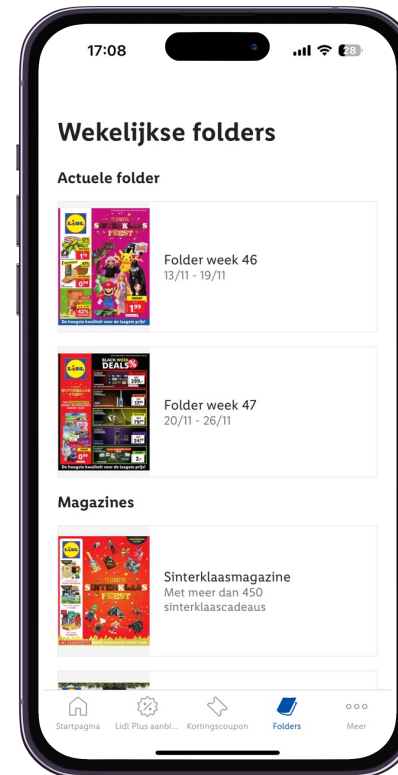
42 AZIATISCHE SPECIALITEITEN
VITASIA
Sushi Kit
VANAF 0.99

STERK IN EIGEN MERK!
De laagste prijs
Bewezen kwaliteit

VOORDEELPAK
Sondey ROOMBOTER STROOPWAFELS
VOLGENS OUD-HOLLANDS RECEPT
16 stuks
VOORDEELVERPAKKING
16 STUKS
OP=OP
2.89
vanaf ma 29 mei

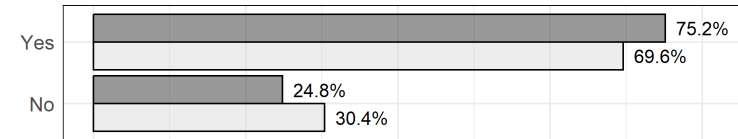
Roomboterstroopwafels
• Volgens oud-Hollands recept
• 640 g
Bron: test stroopwafels, AD, 25 februari 2023.
Sondey roomboterstroopwafels (Lidl) Best Getest.

De hoogste kwaliteit voor de laagste prijs!

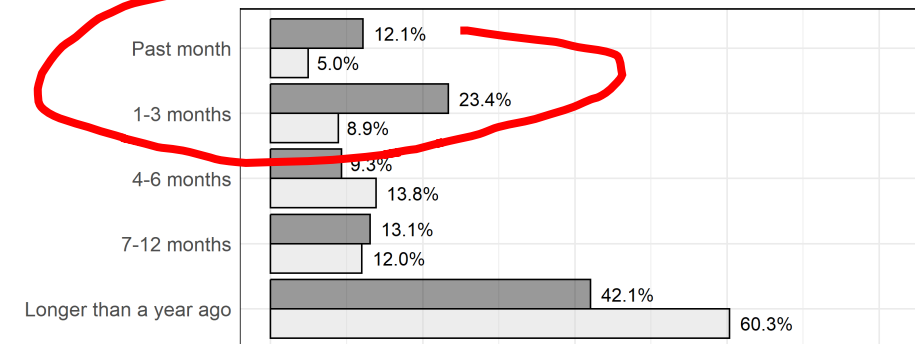


Survey data for the same YouGov panelists

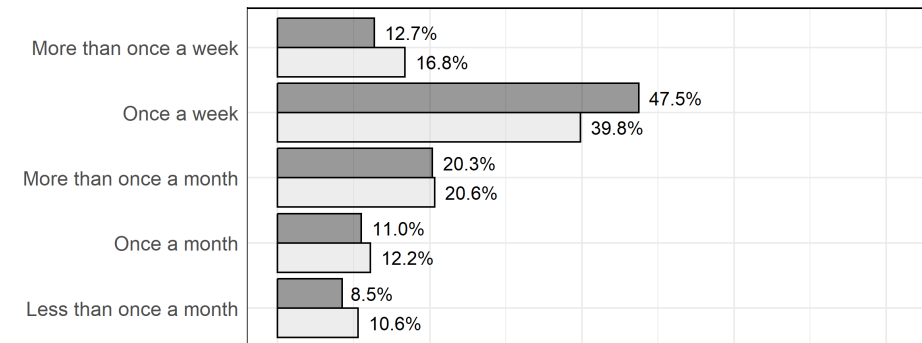
Do you ever check the store flyer digitally?



(If so) How long have you been checking Lidl's store flyer digitally?



(If so) How often do you check the Lidl's store flyer digitally?



■ Treated ■ Control

Pushing households to digital may backfire

- Larger negative effects for households that adopted digital alternatives in the past 3 months compared to those who adopted it before
- No effects for those that did not adopt digital alternatives

RQ4

Do households bring back their shopping when delivery gets reinstated?

Beginning of 2024

- Lidl quietly reinstates the distribution of the flyer



Computing the effect of reinstating flyers

$$\text{effect} = \left\{ \left(\begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ 2024 \end{array} - \begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ \text{before} \end{array} \right) - \left(\begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ 2024 \end{array} - \begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ \text{before} \end{array} \right) \right\} -$$
$$\left\{ \left(\begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ 2023 \end{array} - \begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ \text{before} \end{array} \right) - \left(\begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ 2023 \end{array} - \begin{array}{c} \text{€€€} \\ \text{shopping cart icon} \\ \text{before} \end{array} \right) \right\}$$

*Households in Utrecht

*Households in other provinces

Reinstatement leads to a recovery

- After reinstatement (2024 vs. 2023): trips, spending, promotional spending, non-promotional spending up again
- In the end (2023 vs. before ceasing delivery): no significant effect

But other hard discounter gains

- Other hard discounter sees sustained gains in the end (2023 vs. before ceasing delivery)

Summing up

- Store flyer is not dead and is still useful
- Effects are driven by non-primary shoppers; primary shoppers don't seem to change behavior
- Pushing consumers to digital doesn't work



Recommendations

- If cost is an issue: small experiments (e.g., zip codes) to see who to target (some consumers just really don't read print)
- Combination of print and digital: two-page flyer with link to website/app to see all deals (e.g., Giant Eagle)



Thank you!

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